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Applicant(s): Timothy Farlow et al.

PROVIDING PROGRAM AND POLICY INFORMATION TO
MANAGERS

12579-006001

FIGURE 1

Universal Dynamics

My Site   Site Settings   Help

Manager Advisor | Plan | Deploy | Manage | Evaluate | **Reward** | Authoring | Publishing | Administration | Reporting | Powered by AUTHORIA

Awarding a bonus

← 20

All sources

Shelley Moore - Product Manager

Manager Advisor
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| Highlights | Actions | Tips |

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- Policy snapshot   } 22
- Manager's role
- Legal considerations

Company philosophy

A competitive compensation program can enhance the company's ability to attract, motivate and retain the highest caliber talent. As performance is closely tied to compensation and other rewards, an effective bonus program recognizes employee contribution and encourages a high performance culture.

Related information

a. Understanding the compensation program

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Policy snapshot

Our bonus plan is designed to motivate employees and reward individuals responsible for the overall success of the business.

Reviews are conducted semi-annually, in June and December. The associated bonuses are payable July 15th and December 15th.

The following criteria are used to determine whether a bonus is awarded:
- employee's individual performance against established goals
- the performance of the company as a whole
- relative performance contribution to the business (contribution level compared with peers and associates)
- the amount of bonus budget available to the department

Budget
- The salary committee determines the bonus budget.
- The bonus budget this year is 5% of base compensation.
- Senior management communicates the bonus budget to managers.
- Bonus recommendations should not exceed the budget for the department

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Manager's role

It is your responsibility to:
- determine whether employees should receive a bonus award
- evaluate each employee fairly, based on clear, written objectives
- use the evaluation as a basis for bonus recommendations
- recommend bonus awards to Human Resources in a timely manner
- communicate the approved bonus award to each employee

Guidelines
- Keep bonus award recommendations within the budget for the department.
- Document performance successes and failures that may affect an employee's bonus.
- Provide performance feedback and explain the link between performance and bonus amounts.
- Ensure that your top performers are being rewarded appropriately.

Resources
- Compensation Philosophy Manual
- bonus policy

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Legal considerations

Clear and accurate communication of employee salary-related information, including increases and other rewards, must be conducted in a non-discriminatory manner. All compensation information must be treated as highly confidential.

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← 24

☐ I have read this page and understand the content

[Acknowledge]
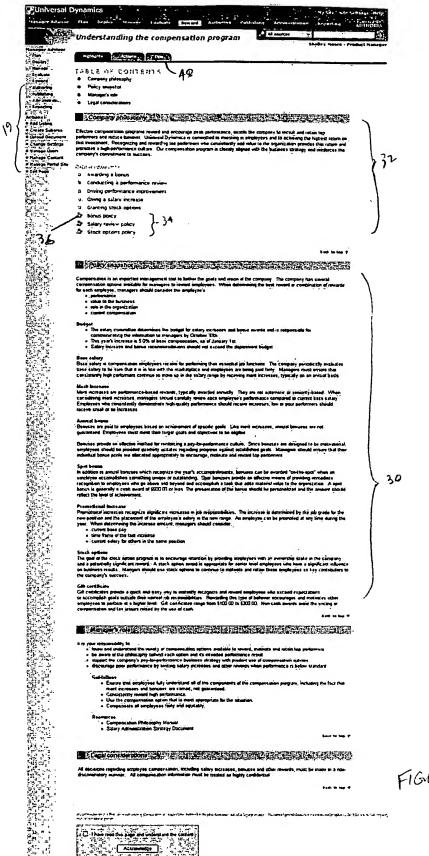
FIGURE 2

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PROVIDING PROGRAM AND POLICY INFORMATION TO MANAGERS
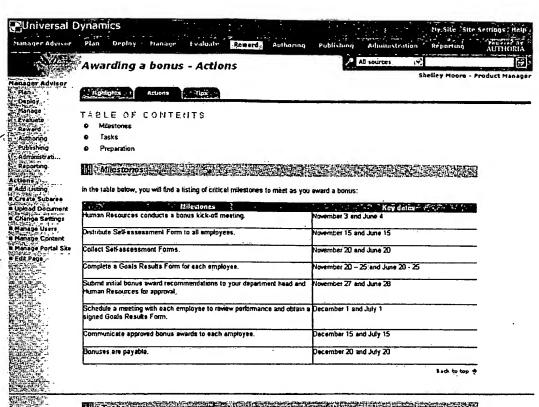
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FIGURE 3

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Universal Dynamics

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All sources

Awarding a bonus - Actions

Shelley Moore - Product Manager

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Milestones

In the table below, you will find a listing of critical milestones to meet as you award a bonus:

Milestones	Key dates
Human Resources conducts a bonus kick-off meeting.	November 3 and June 4
Distribute Self-assessment Form to all employees.	November 15 and June 15
Collect Self-assessment Forms.	November 20 and June 20
Complete a Goals Results Form for each employee.	November 20 – 25 and June 20 - 25
Submit initial bonus award recommendations to your department head and Human Resources for approval.	November 27 and June 28
Schedule a meeting with each employee to review performance and obtain a signed Goals Results Form.	December 1 and July 1
Communicate approved bonus awards to each employee.	December 15 and July 15
Bonuses are payable.	December 20 and July 20

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Tasks

When you award employees a bonus, you must:
- distribute to and collect from each employee a Self-assessment Form
- review employee performance as measured against goals
- complete a Goal Results Form for each employee
- submit initial recommendations to your department head and Human Resources to obtain approval for any proposed bonus awards
- schedule a meeting with each employee to review results
- provide Human Resources with the final Goal Results Form, signed by you and the employee
- communicate the approved bonus award to each employee

Determining the appropriate bonus amount
To determine the appropriate bonus amount for each employee, you should:
- measure the employee's progress against goals
- provide a percentage for "goal accomplished"
- calculate the total individual objective as a percentage
- compare the total individual objective percentage against the employee's bonus opportunity

Providing above average bonuses to top performers
If you feel that certain employees performed significantly better than others and deserve additional rewards, consider increasing their bonus award. To do this, you must:
- be sure the total bonus percentage is still within budget for your department
- obtain approval from your department head if the bonus is beyond the established range for an employee
- be prepared to document how the employee's performance and current responsibilities warrant the additional award

Providing no bonuses to poor performers
If you feel that certain employees did not perform up to standard, you may choose not to award them a bonus. Remember, bonuses are not guaranteed and are a reflection of an employee's performance. The decision not to award a bonus can be an appropriate and effective motivational tool.

If you do not award a bonus to an employee, be sure to:
- document the reasons why the employee should not receive a bonus (e.g., the employee is rated 2.5 or below)
- clearly explain what the employee needs to do going forward to improve performance
- enter zero dollars as a recommended bonus amount

To make bonus recommendations, use the Compensation management system.

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Preparation

To assist you in preparing for awarding a bonus, you may want to review:
- total compensation for each employee
- job grades and bonus opportunities
- annual budget

FIGURE 4

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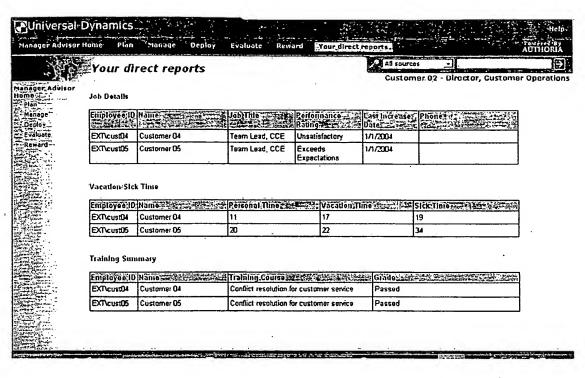
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Universal Dynamics

Manager Advisor Home   Plan   Manage   Deploy   Evaluate   Reward   Your direct reports.

Help

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Your direct reports

All sources

Customer. 02 - Director, Customer Operations

Manager Advisor
Home
Plan
Manage
Deploy
Evaluate
Reward

Job Details

Employee ID	Name	Job Title	Performance Rating	Last Increase Date	Phone
EXT\cust04	Customer 04	Team Lead, CCE	Unsatisfactory	1/1/2004	
EXT\cust05	Customer 05	Team Lead, CCE	Exceeds Expectations	1/1/2004	

Vacation/Sick Time

Employee ID	Name	Personal Time	Vacation Time	Sick Time
EXT\cust04	Customer 04	11	17	19
EXT\cust05	Customer 05	20	22	34

Training Summary

Employee ID	Name	Training Course	Grade
EXT\cust04	Customer 04	Conflict resolution for customer service	Passed
EXT\cust05	Customer 05	Conflict resolution for customer service	Passed

FIGURE 5

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Universal Dynamics   My Site | Site Settings | Help

Manager Advisor   Plan   Deploy   Manage   Evaluate   Reward   Authoring   Publishing   Administration   Reporting   **Powered By AUTHORIA**

Authoring   52   50   66

This topic [ ]

Current Location
- Manager Advisor
  - Authoring
  - Authoring
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Actions
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Maintain event content
- Aligning with corporate goals
- Assessing your current organization
- Awarding a bonus   — 58
- Creating a career development plan
- Creating a performance improvement plan   54
- Conducting a performance review
- Creating a staffing plan
- Creating a succession plan
- Developing a salary plan
- Driving performance improvement
- Giving a salary increase
- Granting stock options
- Hiring an employee
- Identifying your optimum organization
- Managing a change in employee status
- Managing a complaint
- Managing a leave of absence
- Managing a reduction in force
- Managing a resignation
- Managing attendance
- Managing ongoing performance
- Managing the feedback process
- Onboarding an employee
- Promoting an employee
- Recruiting an employee
- Setting goals and objectives
- Staffing a position
- Terminating an employee
- Understanding the compensation program

Maintain configuration   60

Type   Name
- Contact roles
- Employee groups
- Event types
- Links
- Substitution variables
- System variables

Maintain home page content   62

Type   Name
- Home page content

Maintain index pages content

Type   Name
- Index pages content

Maintain employee summary page design

Contacts

Last Name   First Name   Business Phone   E-mail Address

There are no items to show in this view of the "Contacts" list. To create a new item, click "Add new item" below.

- Add new item

Maintain pictures

Maintain resources

FIGURE 6

Matter No.: 12579-006001
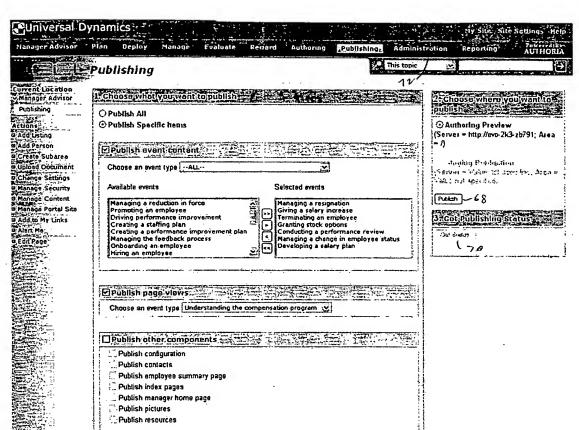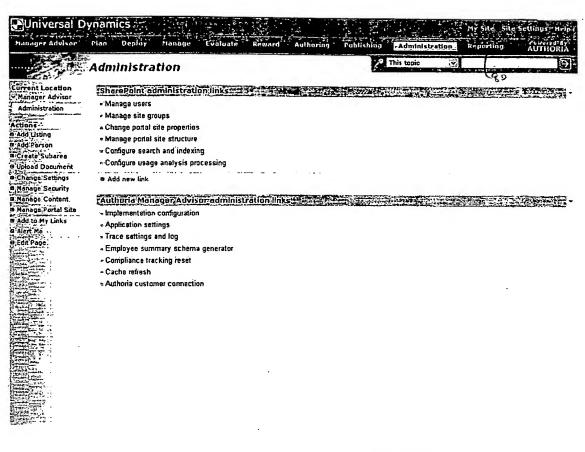Applicant(s): Timothy Farlow et al.
PROVIDING PROGRAM AND POLICY INFORMATION TO
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FIGURE 7

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Applicant(s): Timothy Farlow et al.
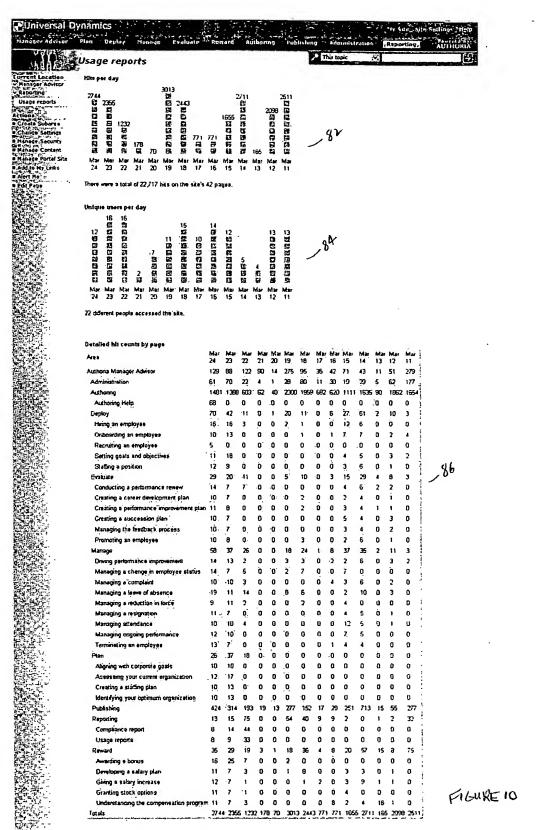PROVIDING PROGRAM AND POLICY INFORMATION TO
MANAGERS

Universal Dynamics

My Site Site Settings Help

Manager Advisor | Plan | Deploy | Manage | Evaluate | Reward | Authoring | Publishing | Administration | Reporting | Powered by AUTHORIA

Administration

This topic

Current Location
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SharePoint administration links
- Manage users
- Manage site groups
- Change portal site properties
- Manage portal site structure
- Configure search and indexing
- Configure usage analysis processing
- Add new link

Authoria Manager/Advisor administration links
- Implementation configuration
- Application settings
- Trace settings and log
- Employee summary schema generator
- Compliance tracking reset
- Cache refresh
- Authoria customer connection

FIGURE 8

FIGURE 9

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Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration **Reporting** AUTHORIA

Site Settings Help

Usage reports

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• Manage Security
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Hits per day

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There were a total of 22,717 hits on the site's 42 pages.

Unique users per day

_84_

22 different people accessed the site.

Detailed hit counts by page

Area	Mar 24	Mar 23	Mar 22	Mar 21	Mar 20	Mar 19	Mar 18	Mar 17	Mar 16	Mar 15	Mar 14	Mar 13	Mar 12	Mar 11
Authoria Manager Advisor	129	88	122	90	14	275	95	36	42	71	43	11	51	279
Administration	61	70	22	4	1	28	80	11	30	19	29	5	62	177
Authoring	1481	1388	603	62	40	2300	1959	692	620	1111	1535	90	1862	1654
Authoring Help	68	0	0	0	0	0	0	0	0	0	0	0	0	0
Deploy	70	42	11	0	1	20	11	0	6	27	61	2	10	3
Hiring an employee	16	16	3	0	0	2	1	0	0	12	6	0	0	0
Onboarding an employee	10	13	0	0	0	0	1	0	1	7	7	0	2	4
Recruiting an employee	5	0	0	0	0	0	0	0	0	0	0	0	0	0
Setting goals and objectives	11	18	0	0	0	0	0	0	0	4	5	0	3	2
Staffing a position	12	9	0	0	0	0	0	0	0	3	6	0	1	0
Evaluate	29	20	11	0	0	5	10	0	3	15	29	4	8	3
Conducting a performance review	14	7	7	0	0	0	0	0	0	4	6	2	2	0
Creating a career development plan	10	7	0	0	0	0	2	0	0	2	4	0	1	0
Creating a performance improvement plan	11	8	0	0	0	0	2	0	0	3	4	1	1	0
Creating a succession plan	10	7	0	0	0	0	0	0	0	5	4	0	3	0
Managing the feedback process	10	7	0	0	0	0	0	0	0	3	4	0	2	0
Promoting an employee	10	8	0	0	0	0	3	0	0	2	6	0	1	0
Manage	58	37	26	0	0	18	24	1	8	37	35	2	11	3
Driving performance improvement	14	13	2	0	0	3	3	0	2	2	6	0	3	2
Managing a change in employee status	14	7	5	0	0	2	7	0	0	7	0	0	0	0
Managing a complaint	10	10	3	0	0	0	0	0	4	3	6	0	2	0
Managing a leave of absence	19	11	14	0	0	6	6	0	0	2	10	0	3	0
Managing a reduction in force	9	11	2	0	0	0	2	0	0	4	0	0	0	0
Managing a resignation	11	7	0	0	0	0	0	0	0	4	5	0	1	0
Managing attendance	10	10	4	0	0	0	0	0	0	12	5	0	1	0
Managing ongoing performance	12	10	0	0	0	0	0	0	0	2	5	0	0	0
Terminating an employee	13	7	0	0	0	0	0	0	1	4	4	0	0	0
Plan	26	37	18	0	0	0	0	0	0	0	0	0	0	0
Aligning with corporate goals	10	10	0	0	0	0	0	0	0	0	0	0	0	0
Assessing your current organization	12	17	0	0	0	0	0	0	0	0	0	0	0	0
Creating a staffing plan	10	13	0	0	0	0	0	0	0	0	0	0	0	0
Identifying your optimum organization	10	13	0	0	0	0	0	0	0	0	0	0	0	0
Publishing	424	314	193	19	13	277	152	17	29	251	713	15	56	277
Reporting	13	15	75	0	0	54	40	9	9	2	0	1	2	32
Compliance report	8	14	44	0	0	0	0	0	0	0	0	0	0	0
Usage reports	8	9	33	0	0	0	0	0	0	0	0	0	0	0
Reward	35	29	19	3	1	18	36	4	8	20	57	15	8	75
Awarding a bonus	16	25	7	0	0	2	0	0	0	0	0	0	0	0
Developing a salary plan	11	7	3	0	0	1	8	0	0	3	3	0	1	0
Giving a salary increase	12	7	1	0	0	0	1	2	0	3	9	1	1	0
Granting stock options	11	7	1	0	0	0	0	0	0	4	0	0	0	0
Understanding the compensation program	11	7	3	0	0	0	0	0	8	2	4	16	1	0
Totals	2744	2355	1232	178	70	3013	2443	771	771	1656	2711	165	2098	2511

_86_

FIGURE 10

You can copy the above table into Excel for further analysis and archiving. Other notes:
• The server updates this usage data once a day at 1:00 AM.
• Usage data specifically for system storage and network capacity planning can be found on the site collection usage summary page.

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Substitution variables   Help

Substitution variables overview

A substitution variable can be used to substitute a value for another value in content that appears on pages. When configuring content, you can use brackets to delineate a variable whose value should be determined using this form. For example, if {employee} is used in content, the system will look for a variable ID named "employee" (case sensitive), and substitute the term in the "Value" column.

Variable id	Description	Value
Company	Substitution variable for the word Company	Company
Companies	Substitution variable for the word Companies	Companies
Company's	Substitution variable for the word Company's	Company's
company	Substitution variable for the word company	company
companies	Substitution variable for the word companies	companies
company's	Substitution variable for the word company's	company's
Company name	Substitution variable for the word Universal Dynamics	Universal Dynamics
Company name's	Substitution variable for the word Universal Dynamics'	Universal Dynamics'
a company	Substitution variable for the phrase a company	a company
Department	Substitution variable for the word Department	Department
Departments	Substitution variable for the word Departments	Departments
Departments'	Substitution variable for the word Department'	Departments'
Department's	Substitution variable for the word Department's	Department's
Departmental	Substitution variable for the word Departmental	Departmental
department	Substitution variable for the word department	department
departments	Substitution variable for the word departments	departments
department's	Substitution variable for the word department's	department's
departments'	Substitution variable for the word departments'	departments'
departmental	Substitution variable for the word departmental	departmental
a departmental	Substitution variable for the phrase a departmental	a departmental
Employee	Substitution variable for the word Employee	Employee
Employees	Substitution variable for the word Employees	Employees
Employee's	Substitution variable for the word Employee's	Employee's
employee	Substitution variable for the word employee	employee
employees	Substitution variable for the word employees	employees
employee's	Substitution variable for the word employee's	employee's
employees'	Substitution variable for the word employees'	employees'
An employee	Substitution variable for the phrase An employee	An employee
an employee	Substitution variable for the phrase an employee	an employee
an employee's	Substitution variable for the phrase an employee's	an employee's
Career management system	Substitution variable for the phrase Career management system	Career management system
Compensation management system	Substitution variable for the phrase Compensation management system	Compensation management system
Human Resources management system	Substitution variable for the phrase Human Resources management system	Human Resources management system
Performance management system	Substitution variable for the phrase Performance management system	Performance management system
Staffing management system	Substitution variable for the phrase Staffing management system	Staffing management system
Time and absence management system	Substitution variable for the phrase Time and absence management system	Time and absence management system
Highlights	Substitution variable for the text of the Highlights tab	Highlights
Actions	Substitution variable for the text of the Actions tab	Actions
Tips	Substitution variable for the text of the Tips tab	Tips
Company philosophy	Substitution variable for the text of the Company philosophy section header	Company philosophy
Policy snapshot	Substitution variable for the text of the Policy snapshot section header	Policy snapshot
Manager's role	Substitution variable for the text of the Manager's role section header	Manager's role
Legal considerations	Substitution variable for the text of the Legal considerations section header	Legal considerations
Preparation	Substitution variable for the text of the Preparation section header	Preparation
Milestones	Substitution variable for the text of the Milestones section header	Milestones
Tools	Substitution variable for the text of the Tools section header	Tools
Tasks	Substitution variable for the text of the Tasks section header	Tasks

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FIGURE 11

FIGURE 12